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ABSTRACT

Aimed specifically at Catholic institutions, this booklet provides guidelines for recruiting and using volunteers in organizational development efforts. The booklet discusses 21 ideas of interest to those who use volunteers in their programs. Topics covered in these 21 short sections are the following: history of volunteerism in America, volunteers and development, importance of volunteers, volunteers--a complement to paid staff, sources of volunteers, inservice of volunteers, "use me or lose me," rights of volunteers, rights of staff, committee work, specific committee assignments, organizing meetings for increased volunteer involvement, common operational ground rules, remembering your people, chief executive officer and volunteers, assignment of tasks, listening, obtaining confidence, associates plan, communication with volunteers, a gift of time, recognition, and ways of recognition. Appended to the guide are a checklist for using volunteers, a volunteer appreciation program, and a brief bibliography. (KC)

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Volunteers

by Robert J. Yeager

National Catholic
Educational Association
Office of Development

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About the Author

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He was previously Executive Director of the Secondary School Department/NCEA after completing high school principalships for 15 years in the Diocese of Toledo.

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Foreword

The involvement of people is well exemplified in what George Bernard Shaw once said: "My life belongs to the whole community, and as long as I live it is my privilege to do for it what I can." Recruiting and training with volunteers for Catholic activity may be the first step in developing an awareness of and an interest in contributing to community activity. This single activity—volunteerism—properly nurtured could rapidly build the type of Catholic community we often describe in theoretical theology texts.

Volunteer talent is especially important because no Catholic institution can afford to hire the staff to carry out all the vital activities of raising funds, press relations, special events, advisory boards and the obtaining of program participants. Even more important, the right volunteer, carefully selected and properly trained and serviced, is often more effective at specific tasks than the professional staff.

Since the project producing these "how to" booklets began almost two years ago, the Development Office NCEA has received many favorable comments. These expressions have encouraged us to move the project to completion. With the publication of "Volunteers" the series is now complete. Comments from users are always welcome.

Reverend Robert J. Yeager
Vice President Development
May 1, 1986

Volunteers

Robert J. Yeager

Volunteerism in America — Historical Perspective

Historically volunteerism in America is a unique phenomenon. Volunteers solving problems and satisfying needs is inherent in the cultural roots of our country. Early American settlers saw problems, formed a group of neighbors and others interested in a solution and got the problem solved. They did not simply talk about the problem and expect the government to solve it as many of their European ancestors had done. It is important when discussing volunteerism in American Catholic institutions to understand the unique role this practice has and is playing in our life.

Volunteers & Development

When we speak of development, we are not talking just about fund raising. We are talking about a concept that includes not only the mechanics of fund raising, but the aims, mission, program and services of the organization seeking the support. In a word we are speaking of *institutional advancement*. Other books in this series discuss the nature of development. Recall here that development is an *organizational-wide* concept. An effective development program involves the entire institution (school, parish, etc.) and all of its related publics—beginning with the program planning which is the reason for the existence of the organization, and including services, facilities and financial planning.

Development seeks to reach several primary objectives:

- to obtain greater acceptance for the institution from its major publics;
- to secure funds;
- to acquire more students of the quantity and quality that an educational institution desires;
- to assist the marketing function in achieving increased utilization of the institution's services.

Why do people give—either time, talent or money—to our institution? It must be clearly stressed that none of these gifts are given simply because the institution asks or because it feels it needs money. Within the Catholic church in the U.S. the day is rapidly fading in which the priest or bishop can obtain gifts from the laity by simply telling of a need and then sitting back and receiving a generous response. People basically give to satisfy their own needs. Development succeeds when the needs of the donor are clearly heard and matched with the needs of the institution. Donors are looking for opportunities to have their needs met in our institutional setting.

Development is constantly busy identifying needs—both individual and institutional. Development also creates needs. Development also shows how the "giving need" can be satisfied. Development is constantly positioning the organization's cause with prospects so that when the prospect is ready, the organization is on their list. A truism states that "The institution needs volunteers, but people need causes." Personal involvement is a key to major gifts.

Importance of Volunteers

Recent research has reinforced the belief that Catholic elementary and secondary schools are highly regarded by most persons. Parish religious education as well as many community out-reach programs are increasing in terms of quantity and quality. With all of this educational interest the average parish and/or Catholic school has millions of dollars worth of volunteer talent at its disposal. This volunteer talent is especially important because:

- few institutions can afford to hire the staff to carry on all the vital activities necessary for their continued success. Often some of these activities such as publications, press relations, raising funds and obtaining more students or

participants are not even thought of as necessary for a successful program;

- even more important, the right volunteer carefully selected and properly trained and serviced, is often more effective at specific tasks or with specific prospects than the professional staff.

Some consider that it is easier for professional staff to do a job then to train and supervise volunteers. Those who work with this assumption are not looking at the whole picture. In planning institutional duties it should become apparent early on that the professional staff is not a panacea for all challenges. Volunteers are important because:

- they add credibility to a cause. They speak the language of the publics whose interest an institution or program is seeking.
- they bring influence. Many volunteers daily live in the world of power and influence. They understand from a practical point of view how power and influence are used to move causes ahead.
- they increase the pool of available human resources. More hands truly do make a job easier and in reality make it possible for an institution to dream about performing more service than they ever thought possible.
- they have the best method of approaching most donors. They already have many of the personal contacts developed which the institution could only start from the beginning to build. In this regard volunteers offer a tremendous saving of time, energy and money.
- the effect that direct involvement has on the volunteer can not be measured. It causes them to become more intimately involved with the program they are promoting.

Volunteers — A Compliment to Paid Staff

Volunteers are a compliment to professional and paid staff. When it is understood that each has an appropriate role in the delivery of program and services then real success will follow. Volunteers are especially helpful when they:

- Interpret and endorse the institutional program to those publics to which they are particularly well connected;
- Enlist additional volunteers according to a job descrip-

tion for volunteers agreed on between them and the professional staff;

- Act as ongoing resource to the professional staff;
- Identify and evaluate donor prospects;
- Solicit contributions;
- Make their own contribution.

Sources of Volunteers

Where does an institution find effective volunteers? From its own family of course—from alumni, parishioners, parents and grandparents of present and former students, members of parish boards and current students. Volunteers are often available from other church constituencies who have programs serving the same general public, e.g. the poor through a soup kitchen or a counseling program for unwed mothers.

Don't neglect persons, regardless of denomination, who have a great interest in Catholic education. Don't forget employees and potential employees of the school's graduates (especially high schools). Don't underestimate pride in the local community, either total or neighborhood, as well as civic responsibility. Some of the best volunteers for Catholic elementary and secondary schools are graduates of colleges who have already been educated to the value of annual and capital funds at the college level. Be on the lookout for newly arrived residents who have worked closely with Catholic programs in their former locality and who would like to keep up their ties with a similar program.

Don't overlook the *young* volunteer. Many of them can play an important role now and an even more important role later. Active association with a school is most valuable to a young person in his career and in his community standing. Current students can use volunteer involvement as a training ground for more responsible volunteer work in later life. Each volunteer experience builds confidence and a great desire to make yet another contribution to *alma mater*.

Repeat prospects are a fertile ground. Outstanding prospects are from those who have previously volunteered for a program which is now complete—especially if this experience was satisfying for the volunteer. While being sensitive to the time demands that volunteerism places on individuals, we should not hesitate to ask successful volunteers again and

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again, provided we have a job in which we can truly use their abilities.

The key to using a volunteer effectively is to ask him to do something *specific* which is within his ability and desire. Do not expect the volunteer to dream up an assignment on his own. This rarely happens. It is the volunteer coordinator's (development director's) responsibility to assign a task which the volunteer *can* do and *wants* to do. If these two requisites are met, there is no limit to what can be accomplished.

That volunteers are tremendoulsly successful in raising funds, in getting the big gift, in obtaining good publicity and good will for the institution, in assisting with business affairs, and aiding the academic program has been too well established to refute. One of the main reasons that Catholic institutions don't have enough volunteers is that they don't ask them. This is the job of the chief operating officer.

Volunteer power is not measured by the number of meetings a volunteer attends. Some volunteers are of crucial importance to an institution because of one single contact they can make a year with a top-flight prospect.

In-Service of Volunteers

Servicing of the volunteer is vital. Development staffs sometimes seem to feel that a volunteer will provide his own steam, will seek his own solutions to obstacles which materialize in his path and will be self-starters. This is not often the case. Behind successful volunteers—and almost always outside the spotlight—is a development person responsible for providing proper support and service.

Use Me or Lose Me

Here is a brief checklist for the proper use of volunteers:

- Have you taken the time to identify the various groups and individuals with a definite interest in your parish school and its programs? Who has a reason for wanting to help with your programs?
- When you enlist a volunteer, do you give him a specific job?
- Do you take every opportunity to acquaint the volunteer with all aspects of the program including its relationship to key personnel?

- Do you show the volunteer that he is building a stronger and more effective institutional program rather than just raising money?
- Is a member of the institutional administrative team assigned to the volunteers to service them?
- Do you safeguard the volunteer's time so that the available time she has to give you is used in the most effective manner?
- Do you inform the volunteer on the outcome of the project with which he is assisting? Do you show what contribution he made to your institution's long-range progress?
- Do you say "Thank you" in appropriate ways?
- Do you publicly recognize the volunteer for his/her contribution of time, energy, money and know-how?
- Do you give the volunteer another task when he has completed his job? If you don't, someone else will.

Rights of the Volunteers

Most volunteers expect and want to work. Few are really attracted by the promise, "we just want to use your name." However, volunteers have a right to expect support from the institutional staff. Volunteers need—and should rightfully expect to receive:

- A clear explanation of the assigned task and its importance.
- Information concerning the relationship of the specific task to the total picture—to the parish's long-range goals and overall aims.
- A plan for procedure, preferably in writing, which clearly states how, when, with whom and with what.
- Effective tools appropriate for the task.
- Complete records on the project or prospect.
- All available information from time to time affecting the project or a prospect.
- Progress reports on the overall project.
- Offers of assistance and expressions of interest from the parish staff and/or other volunteers.
- Thanks for service rendered.
- Continuing reports on subsequent progress.

Rights of Institutional Staff

The parish/school staff, especially the pastor-principal, has a right to expect that a volunteer who has accepted a specific assignment will:

- Inform the staff if something should occur which changes his ability or willingness to do the job.
- Report all progress concerning his project or prospect promptly.
- Not overstep or exceed assignments without first obtaining staff clearance.
- Let the staff know if conflicting interests should arise that might place the institution at a disadvantage.
- Check with the staff before departing from an agreed-on plan.

Obtaining financial support for a Catholic institution is not a matter of begging. Volunteers accepting assignments involving the obtaining of financial support should not be called "solicitors." They are not just asking for money; they are inviting interested persons to make an investment in education and in the future of the impact of the Catholic church in the United States.

Often people will not volunteer because they "do not like to ask for money." However, when they see how significant investments in an institution will bring about the accomplishment of objectives which they understand and are enthusiastic about, they are willing to approach others to make an investment of this kind.

An institution, whether a school or parish, with well-defined plans for realizing these aims through and strengthening programs, staff, student body and physical facilities and with a long-range plan for obtaining these is in a prime position to ask for major investments. A long-range institutional master plan is the best single tool a volunteer can have to make his work effective.

Committee Work

Volunteers are often used on various institutional committees. There are some general guidelines to be observed when volunteers act on committees. The statement "Use me or lose me" is particularly applicable to volunteers. Most women and men who consent to serve on a committee do so in the genuine hope they can be of constructive help. Certainly this is the *only* reason why they should be chosen. There are other

ways such as alumni awards and certificates of merit to recognize past achievement. Volunteers look to the institution to show *how* they can best serve. They assume that the institution will be wise enough to give them a task which is within their experience and capabilities and which is important to the institution's goals.

Professional staff members and administrators often malign the use of committees. However, an active, well serviced committee provides an institution the opportunity to have the participation and involvement of many persons outside the staff and administration. It is vital to any volunteer board or development council to *have* committees (so that responsibilities are shared by many rather than a few). It is equally important that these committees *meet*.

Too many institutions, especially Catholic schools, come up with agendas for committee meetings in which administrative officers do all the talking. Given the recent historical development of volunteer groups this may be understandable but is still not to be tolerated. Administrators complain that volunteers do not participate more, but when it comes to meetings the volunteers are relegated to the role of weary listeners. The most successful volunteers' meetings are those where the volunteers understand the issues and do the talking.

Each volunteer of an institution's board should have at least one major committee assignment each year. Normally a school board or parish council has policy making, policy reviewing committees in the area of educational affairs, business affairs and public relations and development affairs. Committee service should be for a specific term, such as one year, rather than *ad infinitum*. No volunteer wants to feel he is "stuck" and cannot gracefully retire from a job. Likewise, institutions should not get themselves in the position where they are saddled forever with a volunteer who is ineffective or disinterested.

Specific Committee Assignments

The U.S. Catholic church and its programs have often been compared to a big business. There are similarities to be sure, but there are also major differences which need highlighting. One of the most striking differences is the availability of thousands of volunteers whose advice is from some of the best tal-

ent in the country. It is just waiting to be tapped. Volunteers can be used in the area of educational affairs, business and finance, public relations, and fund raising. The following are detailed suggestions for use in each of these areas.

Educational Affairs

- *Long Range Planning*—Many volunteers are experienced in long range planning and financial projection in their own business. They can help pose problems to appropriate committees and arrive at objectives and goals.
- *Community Relations*—Volunteers live in the community. They can be helpful in showing the institution how it can more effectively serve the community or utilize resources available within the institution's area.
- *Library*—Nearly every community has persons interested and knowledgeable in building up library resources. Most school librarians welcome assistance in strengthening and extending the service of their libraries.
- *Religious Education*—This is an area vital to any church related work. There are many interested volunteers who are deeply interested in this subject and whose advice would be most helpful.
- *Personnel*—Sound advice on personnel policies and procedures can be found from volunteers who work directly in this area as well as industrial psychology and law.
- *New Students*—Volunteers, particularly alumni, parents, grandparents and members of the present student body, have proven to be most successful in obtaining the desired quantity and quality of new students.

Business and Finance

- *Investments*—Every community has bankers and investment counselors who can help an institution gain maximum return on its funds. Short term programs including daily investments of unused balance should not be overlooked.

- *Insurance*—It is important to any institution to have expert advice from local authorities in this field.
- *Buildings and Grounds*—Many business persons (men and women) are experts in maintenance, property management, acquisition of real estate, property rentals, planning construction and securing equipment.
- *New Construction*—Dealing with architects, construction firms, clerks of the works, and site planners requires experience and knowledge readily available from volunteers.
- *Legal Work*—Contracts, agreements, leases, law suits, liability exposure, tax work and estate claims are common to many Catholic institutions. While the parish or school will have its own lawyer, the institution can effectively use advice and help in these areas from qualified volunteers.
- *Records and systems*—Computers and other new machines are a part of educational institutions these days. They've been common much longer in industry. Many volunteers can offer help in avoiding common pitfalls in automation.

Public Relations

- *Publications*—Near most institutions are persons who are expert in printing, layout, photography, direct mail procedures, advertising or promotional writing. Many schools and parishes have tapped this talent utilizing this assistance to upgrade institutional publications.
- *Publicity*—Volunteers who are newspaper publishers and editors are usually pleased to advise the institution in its press relations. Asking for specific suggestions regarding a specific event or project is an excellent way to begin.
- *Special Events*—Homecoming, dedications, graduation, grandparents day or other major school events offer opportunities for assistance. Volunteers can be most helpful in securing major speakers for such occasions if they are given enough advance notice.
- *Hospitality*—There are many times throughout the year when programs require hospitality. Many parishes are already implementing the practice of volunteer "welcom-

ers" at the church door for Sunday liturgy. Volunteers are quite good at orienting visitors or even regular parishioners in a desired direction and/or frame of mind.

Fund Raising

- It is an axiom in any development program that no institution can hire enough fund raisers. The volunteer is absolutely indispensible in cultivating prospects and selling the program. Someone once said that important sums are received by having important people ask important prospects for support of important projects.
- Research is basic to all fund raising. In this area, the volunteer is invaluable. An institution which does not seek the help from its volunteers in evaluating and finding the most effective means of cultivating prospects is not very serious about seeking large investments in its program.
- Every Catholic school should have a volunteer committee seeking funds not only from alumni but also from parents (grandparents), businesses and individuals in the local community.
- Corporations and foundations often must be approached by members of the administration, but in many cases a volunteer can help provide an introduction, a follow-up contact, or put in a good word for the institution.
- The area of estate planning is one of the best examples of the importance of the volunteer. Every institution has available trust officers, attorneys, life underwriters and investment counselors who can advise the institution in approaching its constituencies for support from wills, insurance policies, trusts and other forms of estate planning.

Organizing Meetings for Increased Volunteer Involvement

The crucial test of an institution's humane—or inhumane—treatment of its volunteers is its handling of meetings. Meetings are a necessary part of any volunteer program. Successful programs need the power and stimulus which result when people join together to consider and solve a problem. Successful meetings and those which treat volunteers humanely need:

- Plenty of advance notice. Two weeks is not too much no-

tice. A meeting which is regular, either monthly or quarterly, should be scheduled a year at a time.

- A well-planned agenda. The chairperson and the staff normally put an agenda together. It is mailed out well in advance of the meeting. Extra copies should be provided at the actual meeting at each person's place. Do not suppose that each person will bring their mailed copy to the meeting.
- A purpose and a result. Establish a purpose for each meeting and state what results are desired. Results should be in terms of decisions made and action taken. Successful agendas often state the anticipated result of each agenda item as this may change from one item to the next, e.g. one item may be informational, another to seek opinion and yet a third to reach a decision by vote.
- Minutes—or at least a written record of action taken. Such a document summarizes decisions reached and recommendations made. Provide this document to all committee members whether they were present or not. Minutes should be in the hands of volunteers as soon as possible after the meeting, but never later than five days.
- A competent chairperson. An accomplished orator need not preside, but the chair needs to be someone who will start on time, keep the meeting moving along according to the agenda, and stops on time. Chairpersons need to have a certain ability in dealing with people so as not to become orators themselves, but not to allow some other member to hold the floor too long or wonder from the subject.

When institutions err in the proper care of volunteers, the one who often takes the beating is the chairperson of committees of volunteers. Many times the chairperson is left high and dry without adequate staff help. The chairperson of a volunteer committee deserves:

- an adequate orientation to his job;
- a rundown on probable demands on his time;
- an opportunity to help plan meetings at which he presides;
- the opportunity to see all agendas in advance;
- the courtesy of approving minutes before they go out over his signature;
- the assurance that he will be kept informed by the staff

of expected happenings at meetings. Don't let the chairperson be surprised by some foreseen turn of events. The staff and chairperson should be sure they are in control of the situation.

- the knowledge of the expected attendance at meetings at which he is to preside, how many and who are expected.

Common Operational Ground Rules

Good organization procedures help volunteers perform more effectively. The best way to conserve the talents and energies of volunteers is to all agree on the same operational ground rules. Nothing can be more frustrating than lack of communication of shared goals and objectives. In working with volunteers:

- Formulate a table of organization, distribute it and stick to it;
- Have job descriptions of both paid staff as well as volunteers workers. Too often even paid staff members have a job description which is vague and undefined;
- Draw up timetables and priorities for each one's duties;
- Establish definite goals for internal use.

Once a Table of Organization is in place, respect it. Do not ignore a chairperson or bypass him. Either treat him as befits a chairperson or replace him. Go through the proper organizational channels in recruiting, orienting and utilizing workers.

Remembering Your People

Effective use of volunteers begins with remembering your people. Never ask a volunteer to do something today and then forget him/her tomorrow. Every worker and donor has a right to expect to be remembered forever for what he has done. School board members and parish council personnel need to be kept mindful of these people. The responsibility for remembering and reminding belongs ultimately to the CEO (pastor or principal) although it may be delegated to a development director.

All good deeds done in the past should be regarded as promises for the future. Are you remembering your people in this way? What about the worker who has not been active re-

cently? When was the last time you actually asked him or her to take on a specific task for your institution? What about the contributor who has not made a large gift for some years? Have you taken time to take a proposal, or even just an idea, to her about a project in which you know she is interested? The best way to remember your people is to give them further opportunities to serve your institution. Never write anyone off as a future prospect—at least not until the day his will is probated.

CEO and Volunteers

The chief executive officer (CEO, i.e. pastor, principal) is the key factor in the use of volunteers. The CEO has an important responsibility in attracting and utilizing volunteers. He must have an abiding faith in the power of the volunteer to help his institution develop its full potential.

The CEO must be willing to take time to familiarize him/herself with key volunteers, what they have done in the past and help arrive at some conclusions of what they *could* do now to assist the institution. He/she must take time to be interested in the volunteers, to demonstrate this interest by talking and listening to them. Above all, he must use studied patience with key volunteers and major donors—to develop their interest to the point at which they will make a significant contribution to the institution.

Treasurer/ Business Manager & Volunteers

In most Catholic institutions the business manager (bookkeeper, treasurer, etc.) is not directly involved with obtaining and training volunteers. Nevertheless, he/she can make a big difference to the institution's ability to retain friends. The bookkeeper must see that gifts are meticulously used for the purposes for which they were given, that clear and accessible records are kept on endowment funds and other funds being accumulated for special purposes, and that information is made available for reporting to the donor. Recognition of donors often pivots on the interest of the business manager. In some institutions, recognition plaques and other awards which have been promised donors somehow never get ordered or, when they do arrive, remain for months in a corner of the parish/school office.

Board Members and Volunteers

Parish Council and/or school board members should also be involved in "using" volunteers. Donors and workers appreciate recognition from board members currently active in an institution. Often these volunteers served on boards themselves in the past. Too often they feel forgotten by the board members and administration. Council and board members with long service can provide a link with the past. They can see that important past service and gifts are not forgotten. They can constantly be on the lookout for new workers and new donors and assist in bringing them into the fold.

Many council and board members underestimate their own influence. Words of appreciation, of congratulation, of encouragement from board members mean much to donors and workers. Again, the presence of council members at development meetings, fund efforts, and their willingness to participate in fund-raising bespeak in a powerful way their understanding and appreciation of the efforts of others.

Assignment of Tasks

Assigning appropriate tasks to all volunteers is the job of the development department. Remember that the key to "using" a volunteer effectively is to ask her/him to do something *specific* which is within her/his ability. Do not expect him to dream up an assignment on his own. This rarely happens. It is the development staff's job to assign her/him a task which he *can* and *wants* to do. If these two prerequisites are met, there is no limit to what a volunteer will accomplish.

That volunteers are tremendously successful in raising funds, in getting the big gifts, in recruiting students, in obtaining good publicity and good will for a Catholic institution, in assisting with business affairs, and aiding the academic program has been too well established to refute. One of the main reasons that institutions don't have enough volunteers working for them is that they don't ask them.

Listening

Don't always talk at your volunteers—listen to them! When you listen, listen very carefully both verbally and non-verbally. Are they trying to tell you something you may not want to hear about why they work for you or why they somehow don't get around to working for your institution? Have you asked

them if they really understand their specific task and what exactly they are supposed to do?

As you listen to your volunteers, do you hear a desire for more information or assurance about your parish/school plans, efficiency, goals and programs? Do you hear a desire for more participation or more attention or for a different direction to parish/school life? Of course, just because you hear these things does not mean they are right. Nor does it always follow that the institution could or should change. But it is important to *listen*!

Obtaining Confidence

The success of each Catholic institution in achieving adequate support and financial stability depends in large measure on its efforts with its key publics in obtaining their understanding and confidence. Diocesan, regional and national efforts on the part of all Catholic institutions to obtain understanding and support from both private and public sectors must be accelerated. But just as important, and even more immediately crucial, is the job each institution individually faces to reconfirm its aims and purposes, project a sound program to implement these aims, communicate this program to its publics, and obtain their acceptance, confidence, backing, and financial support. Friend-raising for Catholic causes again takes on major significance.

Associate Plan

An *Associates Plan* offers a productive approach to friend-raising. Such a plan modeled particularly on educational institutions is used to cultivate friendship and understanding with its important publics.

The Associate Plan is essentially a summit plan enabling an institution to take selected groups of leaders from its publics and, over a period of time, develop among them an enlightened understanding of the meaning of Catholicism in general and of the particular importance of the individual school or parish. Associates programs could be called by such names as the Board of Associates, Board of Education, Parish Council (in addition to its canonical duties), or pastor's advisory board.

Essential Factors

Three factors are essential for an effective Associates Plan:

- Membership must be highly selective. The premise for the Associates is that bringing together the selected opinion holders (molders) of a community gradually influences the total climate of the community to the institution.
- The primary purpose must be "friend raising" for the institution's purposes—not "fund-raising." Many institutions have so-called Associates Groups. Sometimes their real purpose is fund-raising. If so, they will not achieve the chief purpose of Associates which is to bring about closer relationships, better understanding, and greater acceptance between the institution and its publics.
- The program must have real value and interest for its members.

Potential Advantages

Catholic institutions which have set up Associates Plans find that they have identified and brought to the institution a pool of women and men who will:

- Understand and interpret Catholic religious practices and be ambassadors for these causes;
- Become acquainted with the individual parish/school, its program, administrators, staff and parishioners/students;
- Supply leadership to assure growth and financial support;
- Provide an important and tested source for future committees, councils and boards;
- Defend and promote the institution in the advancement of its program.

What do Associates Really Do?

Just as many Catholic institutions have been unable to resist the temptation to convert the Associates into a fund-raising group, so others have hesitated to organize Associate groups

because they have not found the answer to the question, "But what will the Associates really do?"

Emphasis of an effective Associates Plan is not on meetings, committees and projects (although there can be all three), but rather on the identification, selection, and linking to the school or parish an influential group of women and men who are opinion influences in their areas. Such an association is beneficial both to the individual and the institution.

Each member elected as an Associate can be assured that he/she is needed by the institution and that as an Associate, he/she can:

- Provide two-way communication between the institution and its publics.
- Give advice to the parish/school as it faces major issues.
- Provide counsel, through service on a committee, to administrators in charge of specific areas.
- Be a center of influence for the institution in his/her own community, business or profession.

Meetings may range from one or two a year to quarterly or monthly depending on interest and amount of activity. An Associates Plan will not achieve its mission if the only opportunity offered to members for seeing the institution is limited to celebrations (liturgy) or in the case of schools major athletic events. The program should acquaint the Associates with the diversity of the program as well as its purpose and philosophy.

Perhaps the most effective relationship between the institution and the Associate is person-to-person as the CEO visits the Associate in his/her office or home.

Many institutions find themselves wishing they could involve key business leaders who have just moved into their community or important leaders or influential women and men from all walks of life. The institution can reach some of these through offering positions on boards and councils. But, many of these potential friends have not yet reached the point that they can be offered or will accept these posts which involve specific and heavy responsibilities. The Associates approach provides an opportunity to establish a relationship with important men and women so that they and the parish/school can become better acquainted and find mutual interests. The Associates Program offers high potential for making friends.

Communication with Volunteers

By now it should be obvious that continuous, close communication with volunteers is imperative in these times in which Catholic institutions sometimes suffer from credibility problems. Donors and volunteers are re-evaluating their generosity, especially due to the many demands on both their time and money. In a relationship with volunteers today, a Catholic institution should:

- Place primary emphasis on the purposes for which the institution was founded and why it seeks support today.
- Stress what has been achieved with past support and what the successful completion of present programs will mean both for the community and for the participants.
- Enable the volunteer to give support through methods most advantageous to him/her.
- Maintain a positive approach. No volunteer wishes to give service on the Titanic. Institutions must emphasize today more than ever the *positive* aspects of their program.
- Stress personal contacts. Many times volunteers are not even known by name especially by the pastor or members of the administrative team. More time and thought should be given to personalizing an ongoing relationship with volunteers. Correspondence will play some part—but at a minimum at least several personal contacts must be made each year.
- Seek involvement for programs that have the greatest interest for a specific volunteer. Every parish/school should take a close look at past volunteer work. In most cases, donors have clearly signaled their interest. Too often these have been ignored.

A Gift of Time

When volunteers enter into a parish or school program they give a very precious gift—time. This gift is often more significant than monetary gifts because it cannot be replaced. Through a use of personal time, a volunteer can demonstrate his/her sense of values and support the causes he/she considers important. Through such a gift appreciation and confidence can be expressed. Albeit ever so small, a volunteer becomes a part of a program which can live even after the death of the volunteer. Such involvement appeals to people.

Every gift bears a message and meaning all its own. The time given by a volunteer may have significance and implications beyond what is actually accomplished. The intent of the volunteer is everything. From a volunteer's point of view, a "time gift" can be:

- the volunteer's way of saying he believes in the parish or school.
- a reaffirmation of the volunteer's interest and belief in Catholicism and its program.
- a way of saying the volunteer realizes that our nation needs strong religious institutions.
- an investment in youth (in the case of schools) and a recognition that sound education is still one of the hopes for the future.

Recognition

Begin to thank a volunteer as soon as they agree to be active in some program. Their name has been added to the list of those who will be doing something in the future. Each time the project is discussed (verbally or in writing) the names of the volunteers should be mentioned. An immediate note from the person in charge—or even a phone call thanking them for volunteering is most appropriate. Don't stop thanking the volunteer as soon as the "thank you" has been fired off. They need to be thanked initially, while the work is going on and after completion of the whole task.

Volunteers are human. They like to be appreciated. They enjoy being thanked. More often than not, appropriate recognition will strike a deep, responsive chord, bringing satisfaction and enduring gratitude to the volunteer. It is rare that the volunteer places less importance on his/her time than does the institution. Genuine gratitude which is appropriately expressed in word and deed will stimulate volunteers more than any red ink on a balance sheet or threats of impending crises.

Why do some volunteers continue to work more and more for a parish or school? A deep conviction in the merits of the institution is the prime reason. But one reason often overlooked is the sheer pleasure the volunteer and even his/her family derive from giving. Often the pleasure comes from the recognition received. Equally often, personal satisfaction

comes from the sincere manner in which the institution and the persons representing the institution say "thank you."

Ways of Recognition

There are many ways to recognize volunteers. Whatever method is used, it is important to follow the volunteer's wishes. If he asks for no publicity honor his wish—but do not fail to thank him for what he has done. Mention has been made earlier about prompt recognition—even at the time that people are first "signing on" as volunteers. Many parishes have an evening annually or semi-annually to recognize volunteers. These occasions cover the horizon from very informal to very formal. The likes and dislikes of the volunteers will indicate the direction to be taken.

Don't forget to thank those who helped recruit the volunteers. Many times, they themselves are also volunteers.

Gratitude is the major factor in attracting and maintaining volunteers. Donors give of their time and energies because of remembrance of past gratitude and the desire to be of additional help, for which continuing appreciation can be expressed.

Summary

Obtaining confidence and understanding is a major task of every Catholic institution. Institutional success in achieving adequate support and financial stability depends in large measure on efforts with key publics to obtain their understanding and confidence. Local and even regional cooperative efforts on the part of Catholic elementary and secondary schools to obtain understanding and support from both private and public sectors must be accelerated. Just as important, and even more immediately crucial is the job each institution individually faces to reconfirm its aims and purposes, project a sound program to implement these aims, communicate this program to its publics and obtain their acceptance, confidence, backing and financial support. Friend-raising for Catholic education again takes on major significance.

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Appendices

A

Appendix

Checklist for Utilizing Volunteers

Sources for Volunteer Workers

- *Board Members*—Has your institution shown its trustees that their responsibility does not end merely with establishing policy, but that they can be effective by working for the principal pastor and staff in implementing policy?
- *The Institutional Family*—Have you created opportunities for your alumni, parents, students and faculty to be of practical assistance in your development program?
- *The Local Community*—Do you take definite steps to involve leaders in your immediate community in the formulation of your development program and give them specific tasks in carrying it out?
- *Faculty or Parish Staff*—Have you taken advantage of the knowledge your faculty has concerning your alumni, parents, and other groups? Do you ask their help in identifying effective volunteer workers?
- *Publics*—Have you taken the time to identify the various groups with a definite interest in your institution? Who would have a reason for wanting to help you with your program?

Obtaining Volunteers

- When you enlist a volunteer, are you asking him/her to do a specific job, instead of inviting the volunteer to run the institution?
- Do you make sure that the person you are asking to do the job has the necessary capability?
- Is each volunteer sufficiently informed to make sure he/she wants the job? And are you sure you want him to represent your institution?

- Do you make sure that the right person on your team does the asking?
- In enlisting volunteers, do you show how the worker can help you reach goals in which he/she has a definite interest rather than appealing on the basis of need and of getting your institution out of a jam?

Orienting Volunteers in Their Jobs

- Do you have a job description for all volunteers?
- Do you have definite goals and priorities for each task?
- Do you do an adequate job of acquainting the worker with your entire institution, including its top leadership?
- Do you bring the workers to your institution?
- Do you show each volunteer how the effective performance of his duties will help the institution reach its goals?
- Is the volunteer shown that he/she is building a stronger and more effective institution, rather than just raising money?

Training The Workers

- Do you allow adequate time to train the workers?
- Do you encourage questions and answer them fully?
- Is the trainer qualified? Does he/she know the job and how to teach it?
- Do you spend enough time on training so that the volunteer really understands the job and how to do it?

Supervising The Volunteer

- Is your volunteer given adequate tools such as printed materials, literature, instructions?
- Is there adequate communication down *and up* the line?

- Is a member of the institution's administrative staff assigned to the volunteers to service them?
- Do you keep close track of progress so that you will always know when direction is needed?
- Do you make clear to whom the volunteers should report, what kind of report is expected, and when?
- Do you respect the volunteer's time and curtail unnecessary or too-lengthy meetings?
- Do you safeguard the volunteer's time so that the available time he/she has to give you is used in the most effective manner?

Recognizing The Volunteer's Services

- Do you inform the volunteer on the outcome of the project with which he/she is assisting? Do you show what contribution he/she made to your institution's long-range progress?
- Do you publicly recognize the volunteer for the contribution of time, energy, and know-how?
- Do you say "Thank you"?

Volunteer Appreciation Program

The following ingredients when mixed properly form a well balanced volunteer appreciation program.

- *Gratitude from the top.* The pastor-principal (CEO) sets the pace. If he displays a sensitive awareness and gratitude for even small gifts, others on his staff follow suit. If the CEO appears indifferent, the whole appreciation program will be mechanical, tardy and unfeeling.

- *Speedy Acknowledgment.* Volunteers are anxious to know that their assistance has made a difference. A note of thanks should be considered much like a receipt for a cash gift.

- *Personal Appreciation.* Acknowledgment of the work of volunteers should be as personal as time and the budget will permit. Volunteers are impressed by letters which show the writer has given thought to the volunteer's personal contribution. In some cases it is appropriate for several "thank you" letters to be written.

- *Public Recognition.* The volunteer who does not appreciate recognition is the exception rather than the rule. Most volunteers respond favorably to recognition. Plaques, honor rolls, news stories, appreciation luncheons, all provide means of recognition for volunteers.

- *Accountability.* Using the efforts of volunteers in a meaningful way and keep track of these is part of appreciation. A volunteer's work and time of very dear commodities. Build assurance in the volunteer that his/her efforts are helping to move a program toward a goal shared by all participants.

- *Continued Courtship.* Appreciation must not stop with the "thank you" letter. Plan activities periodically to sustain the volunteer's interest in your institution. Dedications, special liturgies, open houses and major public programs all provide valuable opportunities to bring volunteers to the institution again and again.

- *Involve Others.* Large numbers of volunteers rarely are organized simply because of one person's efforts. Many persons usually have a hand in influencing people's decisions to volunteer. Be sure to thank those who helped discover and organize all volunteer efforts. They also appreciate recognition. Don't forget the family of the volunteer—many times they have had to make sacrifices so the volunteer could be active in the institutional program. They are also excellent prospects for further volunteer work in the future.

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